BizRevGrowth

Ridgeline Truck Outfitters 90-Day Roadmap

Sample roadmap, generated by Force Multiplier. Owner and operator: Dan. A 20-year truck and Jeep accessory shop: lifts and leveling, wheels and tires, fleet upfitting, powersports.

A real output from the roadmap generator, run on an invented shop. The shop, the people, the documents and the figures are made up; the depth, the math and the format are what you receive. Every dollar line is a benchmarked estimate with its assumption stated. Results vary by shop.

> **How to read this.** Section 3 puts a number on each blind spot, with the assumption behind it. Sections 4 to 6 are the 90 days, in order, each step naming who does it, the Shop System it installs (FM01 to FM12) and the number it moves. Section 7 is the list you check on day 90.

1 Situation Diagnosis

The numbers are healthy, and the operating model behind them is not ready to be sold. In FY2025 Ridgeline did $3,000,000 in revenue at a 45.0% gross margin and kept $336,000 in net profit, 11.2% of revenue. Checking held $142,600 at Dec 31, 2025. Finance scored 80%, and it earned it.

Everything that has to happen without Dan in the room is a different story. Accountability scored 40% and Data & AI scored 40%. Dan prices every job, approves every spend over a few thousand dollars, hires, trains and markets, and he is still the best fitment and fab tech in the building. Seven people report to him directly. The handbook already says "Every quote gets a follow-up. Every install gets a review request." Nobody owns either one.

The 2026 goals name the symptom correctly. The bays run at roughly 65% utilization while the Q1 2026 pipeline report shows $305,000 in retail quotes. That gap is administrative, not physical. This is a $3.0M shop operating at Building stage, with revenue ahead of the operating model. For a Legacy Owner selling in three years, that is the central fact, because a buyer pays for what runs without the owner.

Concentration is moderate. Fleet was $300,000, 10% of FY2025 revenue, and no single account's share is documented yet. Measure it before a buyer does.

2 Ghost Bottleneck

Dan is the price. The assessment scored Delegation at 80%, and the daily work probably is delegated. Installers install and parts orders parts. The decision that carries the margin, what this job costs this customer, has never left his head.

That one fact produces the surface symptoms. The counter cannot quote without him, so quotes wait for him. Follow-up has nothing to chase until he prices the job. Nobody can own close rate or open quote dollars, because those numbers belong to him. That is why Accountability sits at 40%: you cannot hold people to numbers they were never authorized to move.

The no-show techs land on him for the same reason. With seven direct reports and no floor lead, his desk is the only place accountability can sit. If the rhythm gets installed without moving pricing authority, the scorecard becomes a weekly report on Dan.

3 Quantified Opportunity

These are benchmarked estimates of annual opportunity, not promised results. Acting on them is Ridgeline's work, and the result is Dan's to earn. Every figure comes from the FY2025 P&L ($3,000,000 revenue, 45.0% gross margin), the Dec 31, 2025 balance sheet, or the Q1 2026 pipeline report. Where a figure is not in the documents, it is labeled as a benchmark and its assumption is shown. The documents do not name distributors, individual fleet accounts, or marketing spend by channel, so none of those are named here.

Context for the margin lines. Gross margin was 45.0% in FY2025. Shops in this trade commonly plan around 50%. That 5.0-point gap on $3,000,000 is $150,000 of gross profit a year. The first three lines and the distributor line are the levers that close part of it.

Lever	Annual estimate	Assumption behind it
1. Retail price increase (FM06 Numbers, Margin and Cash)	**$66,600 to $112,600**	3 to 5% realized increase on accessories, parts and install ($1,620,000), installation labor ($390,000) and powersports ($120,000), for a $2,130,000 base: $63,900 to $106,500. Plus 1 to 2% on wheels and tires ($480,000), kept low because the tire chains set that price: $4,800 to $9,600. Combined $68,700 to $116,100, reduced 3% for assumed card fees on the increment. No commission line appears on the P&L. If one exists in payroll, reduce further. Fleet and online are excluded here.
2. Fleet pricing refresh at renewal (FM06, FM10 Repeat Business, Reviews and Reactivation)	**$6,000 to $12,000**	2 to 4% on the $300,000 fleet and utility upfitting line, applied account by account with notice. Assumes some accounts are on pricing older than a year. Verify in the ticket export.
3. Discount discipline (FM06, FM07 Quote-to-Close and Lead Flow)	**$12,700 to $38,000**	0.5 to 1.5% of retail revenue ($2,610,000, excluding fleet and online), less 3% card fees. This is far below the 5 to 15% benchmark for unmanaged discounting, because Dan prices every job himself. The leakage to find is concessions made when he is not at the counter. The 90-day ticket export confirms or kills this line.
4. Distributor spend (FM06)	**$16,500 to $33,000**	1 to 2% of the $1,650,000 cost of goods (parts, tires, freight) through volume consolidation, freight terms, and claims on short and wrong shipments that are eaten today. Distributor AP was $128,500 at Dec 31, 2025.

Lever	Annual estimate	Assumption behind it
5. Overhead rebid (FM06)	**$10,800 to $21,600**	5 to 10% of $216,000 addressable recurring spend: marketing, software and insurance ($84,000) plus equipment leases, vehicle and other ($132,000). Insurance rebid, software overlap, and leases at renewal. Rent is excluded.
6. Quote follow-up (FM07)	**$16,500 to $32,900**	Q1 2026 retail quote lines (walk-in $96,000, website $84,000, referrals $58,000, dealer referrals $45,000, social $22,000) total $305,000. Annualized at four times Q1, that is about $1,220,000, likely low because spring is heavier. Recovering 3 to 6% of quoted dollars as added closes is $36,600 to $73,200 of revenue, taken at the 45.0% gross margin.
7. Reactivation and service reminders (FM10)	**$18,000 to $36,000**	Benchmark, because the list size and average ticket are not in the documents. Assumes 2,000 reachable past customers from 20 years of work, a 2 to 4% booking rate, and a $1,000 average ticket (the trade figure). That is 40 to 80 jobs, or $40,000 to $80,000 of revenue, at the 45.0% gross margin.
8. Lost bay-days from no-shows (FM04 Weekly Scorecard and Accountability Rhythm, FM05 Hiring, Crew and Org Structure)	**$16,200 to $32,400**	Benchmark. FY2025 gross profit of $1,350,000 over 1,000 bay-days (4 bays at roughly 250 working days) is about $1,350 of gross profit per bay-day. Assumes 1 to 2 bay-days a month are lost outright to a tech not showing, not just rescheduled. That is 12 to 24 days a year. The attendance log in Step 2 replaces this assumption with a count.
9. Comebacks and rework (FM08 Order-to-Install Process System)	**$3,900 to $11,700**	Benchmark, because comebacks are not counted today. Assumes 1 to 3% of the $390,000 separately billed labor line is absorbed as free rework. This is conservative, because it excludes the install labor inside the accessories line.

Total Identified Opportunity: $167,200 to $330,200 a year, against FY2025 net profit of $336,000.

How to read the total:

- **Lines 1 to 5 are cash levers.** They need no new customers and start in Phase 1.
- **Lines 6 to 8 add volume.** The roughly 35% of unsold bay capacity absorbs that volume without a fifth bay.
- **The levers interact.** A price increase can soften close rate a little, which is one reason the ranges are wide.
- **The AI ROI run is a cross-check, not an addition.** It identified $99,426 in new annual profit (average transaction value about $33,600, net profit margin about $33,600, conversion about $16,800). That overlaps lines 1, 3 and 6, so it is not added to this total.
- **Cash is excluded from the total.** Faster collection of the $38,400 in fleet receivables and clearing slow stock from the $214,000 in inventory would release cash once. They do not add recurring profit.

4 Phase 1: Stabilize (Days 1 to 30)

The goal of this phase is to put the week on a page, move the first piece of pricing authority off Dan's desk, and stop the leaks that cost money this month. Nothing here requires a hire.

Step 1: Weekly Shop Scorecard and the 45-Minute Shop Meeting

Delegable (Dan sets it up, the counter/service writer runs the sheet)

- **System:** FM04 Weekly Scorecard and Accountability Rhythm

- **Owner:** Dan picks the numbers. The counter/service writer keeps the sheet. Each line gets the name of the person closest to the work.
- **Due:** Scorecard live by Day 14. Meeting held three times by Day 30.

What to do:

Pick seven numbers, no more:

- Quotes sent in dollars
- Open quotes past seven days
- Bay hours sold against bay hours available (the baseline is roughly 65%)
- Jobs delivered on the promised day
- Scheduled installer hours missed
- Comebacks
- Review requests sent against jobs closed

Define each number in one sentence. For example: does a verbal counter quote count? Is a fleet job delivered when it leaves, or when it is invoiced?

Lock one early-week slot for 45 minutes, before the bays fill.

Tape up the five-part agenda: good news, scorecard, rocks, issues, who tells the crew what.

When a number is under target, ask why out loud and assign one action before the meeting moves on.

Number it moves: Bay hours sold against available. This is the leading line every other step feeds.

Done looks like: Four weeks of scorecard history, a name on every line, and three dated decision lists. Owners report their own numbers, and Dan reads them.

Step 2: The Attendance Standard and the Conversation You Have Been Carrying

Owner Only

- **System:** FM05 Hiring, Crew and Org Structure (the Employee File and the Handbook), with FM11 Hard Conversations, Crises and Key Relationships (the Three-Day Hard Conversation)
- **Owner:** Dan
- **Due:** Rule posted by Day 10. Thirty days of logged attendance by Day 30.

What to do:

Write the attendance rule on half a page and add it to the handbook: when to call in, who to call, what counts as late, and what happens on the second and third occurrence.

Apply the rule the same way to every person.

Have the counter/service writer log every missed scheduled hour by name. This also feeds the scorecard line from Step 1.

When anyone hits a second occurrence, hold the conversation within three days. State the facts, ask once what is going on, and write down a new commitment.

Treat a no-show as a signal about the job as well as a discipline issue. It can point to pay, schedule, the lead, or the fit for the role. The conversation surfaces which one.

Decision Point: If the log shows the problem is one person, run that person against a role card using the FM05 Crew Grid and the Hard Call Protocol. Keeping a tech everybody works around feels cheaper than losing him. It usually is not, because the rest of the crew watches what the standard is worth. If a separation carries real legal exposure, talk to employment counsel before you act. Dan makes the call.

Number it moves:

- Leading: scheduled installer hours missed per week.
- Lagging: bay-days lost per month (line 8 above).

Done looks like: A posted rule, thirty days of log, every second occurrence followed by a documented conversation inside three days, and the same standard applied to every name.

Step 3: The Rate Card, Discount Limits and the Price Decision

Owner Only

- **System:** FM06 Numbers, Margin and Cash (Margin by Job Type, and the Written Rate Card and Discount Rules), with the first authority transfer from FM03 Decision Authority and Delegation
- **Owner:** Dan decides. The office person runs the ticket export.
- **Due:** Ranked margin list by Day 14. Rate card and discount limits live at the counter by Day 30.

What to do:

Pull the tickets. The office person exports 90 days of closed tickets. AI is safe to use here because it is internal and a person reads every line. Claude, or the AI in whatever spreadsheet Ridgeline already uses, can tag tickets by job type, split parts from labor, separate retail from fleet, and flag tickets where freight never landed on the job or where discounts cluster.

Rank the lines. Dan ranks the six revenue lines and the job types inside them, best margin to worst. Circle the bottom three and write a reason beside each: underpriced, overserviced, or wrong work for the bay.

Write the rate card. It covers the labor rate, standard install times for the top job types, and package pricing for lift, wheels, tires and alignment.

Write the three price answers for the counter: "The shop across town is cheaper." "I can buy the part online." "Can you do better?"

Set one written dollar limit for counter discounts. That limit is the first piece of pricing authority to leave Dan's head.

Decision Point:

- Choose the size of the increase. The estimate above assumes 3 to 5% on accessories, labor and powersports, and 1 to 2% on wheels and tires, where the chains set the market.
- Choose the effective date and how customers hear about it.
- Move fleet accounts at renewal with written notice, not all at once.
- Write the date of the next annual price review on the calendar now.

Number it moves:

- Leading: discounts given per week, in dollars.
- Lagging: gross margin percent by job type over the quarter, against the FY2025 baseline of 45.0% overall.

Done looks like: The counter/service writer quotes a lift and leveling package off the card the way Dan would, inside the written discount limit, without walking to the bay.

Step 4: The Open Quote Board and the Follow-Up Owner

Delegable

- **System:** FM07 Quote-to-Close and Lead Flow
- **Owner:** Counter/service writer
- **Due:** Board built by Day 14. Backlog worked once by Day 21. Follow-up schedule running by Day 30.

What to do:

Put every unclosed quote from the last 60 days on one sheet: customer, vehicle, amount, date sent, age, owner, and next contact date. Total the column at the bottom.

Start from the Q1 2026 pipeline report: $305,000 in retail quote lines plus $120,000 in fleet and commercial bids.

Work the backlog oldest first. Call, don't text, on anything above a dollar amount Dan picks.

Write the follow-up schedule: first contact inside a day, second within three days, third within a week. Every quote then gets an ending: won, lost with the reason, or moved to the reactivation list.

Add one question to every quote and every phone call: "How did you hear about us?" This starts the lead source count the plan needs later.

The mechanism here is the same one John, a Navy veteran and former VP of Accessories, saw at LINE-X Automotive Accessories. Operating income grew substantially in 18 months once the commercial model, the sales organization and distribution were restructured, so the same 500-plus franchise network got parts faster and bought more. The sales half was a visible pipeline with a name on every follow-up.

Number it moves:

- Leading: open quote dollars, missed touches, and the share of quotes with first contact inside a day.
- Lagging: close rate on quotes written, for the shop and for each person who quotes.

Done looks like: Every open quote has an owner and a date. The counter/service writer reads open quote dollars in the weekly meeting. At least one job is recovered from a quote that would have died of silence.

Step 5: The Parts-Landed Check and the Distributor Call

Delegable

- **System:** FM08 Order-to-Install Process System (the Parts-Landed Check and the Distributor Call)
- **Owner:** Parts and inventory person
- **Due:** Running daily by Day 21.

What to do:

Name the person and a fixed time each afternoon. Every delivery is matched against the order before anything goes on a shelf.

Use a three-column sheet: ordered, arrived, short or wrong. Note the job each part belongs to.

Write the short-part routine in order: call the distributor with the order and part number ready, open the claim, call the customer before he calls the shop, and move the board while a complete job can still move up.

Log every short, wrong, or damaged shipment and the freight eaten on it. That log is the evidence Dan takes into the distributor conversation in Step 10.

Number it moves:

- Leading: the share of next week's board with parts confirmed in the building, and whether the check happened every day.
- Lagging: bay hours lost waiting on parts, and "is my part in yet" calls per week.

Done looks like: The six o'clock calls stop reaching Dan, and two weeks of short-shipment log exist.

5 Phase 2: Build (Days 31 to 60)

The goal of this phase is to give the shop one record, a floor lead, written authority, and a plan the crew can read. This is where the seven direct reports start becoming three.

Step 6: The Customer and Vehicle Record

Delegable (Dan rules on which source wins, then hands it off)

- **System:** FM09 One System of Record and AI, the record half only
- **Owner:** The counter/service writer owns the shop system record. The office person owns the money side.
- **Due:** Source list and winners posted by Day 40. Record standard applied forward and the weekly check running by Day 55.

What to do:

List every place customer, vehicle, job, order and money information lives: the shop system, the books, the paper files, the counter notebook, the text threads, the distributor portals.

Trace five recent jobs across every source and write down where they disagree.

Dan names the winning source for each category and posts it at the counter.

Write the record standard as fields: customer, a phone number that takes texts, vehicle (year, make, model, trim, cab and bed), what was sold, what is on order with promised and landed dates, and what the vehicle is due for next.

Attach the vehicle to the customer in the shop system. Ask the support rep before buying anything.

Apply the standard forward from a set Monday. Do not clean up 20 years of history. Backfill one list only: lift and leveling buyers from the last 18 months, which feeds Step 11.

Each week, score ten random records against the standard and report the result on the scorecard.

AI gate: AI stays internal until this record holds. Customer-facing tools wait. Dan's AI readiness is 40%, with every dimension at 2 out of 5. A tool reading the current mess would be wrong in public.

Number it moves:

- Leading: the share of new jobs meeting the standard, from the ten-record check.
- Lagging: time to pull a callable list cold, and paper files retired for new work. That is a stated 2026 goal.

Done looks like: Whoever picks up the phone answers "is my part in yet" from one screen, and the lift buyer list comes out in minutes.

Step 7: The Floor Lead, the Authority Pages and the Org Chart

Owner Only

- **System:** FM03 Decision Authority and Delegation, with FM05 Hiring, Crew and Org Structure (the Shop Org Chart and the Lead Development Track)
- **Owner:** Dan
- **Due:** Seven-day decision log done by Day 37. Authority pages signed and the org chart posted by Day 60.

What to do:

Run a seven-day decision log. Write down every decision that reaches Dan and sort each into one of two piles: genuinely his, or his because it was faster than explaining.

Write signed authority pages for the counter/service writer, the parts and inventory person, and the floor lead. Each page answers four questions: what you own outright, where your authority stops, what you need to decide well, and what you bring to Dan and how fast.

Write dollar limits in six categories: counter discounts, parts and special orders, comeback and redo work, tools and shop supplies, overtime, and customer goodwill.

Write the escalation list and a standing answers sheet covering the seven to ten questions Dan answers the same way every month.

Draw the org chart by function. The likely shape:

- Installers and the wheel and tire tech report to the floor lead.
- Parts reports to the counter/service writer.
- The office person reports to Dan. That takes Dan from seven direct reports to three. He decides the final shape.

Decision Point: Who becomes floor lead. The fastest installer is not automatically the right choice. Test whether the candidate can run people and read what a job earns per bay hour before handing over the title. The FM05 Lead Development Track covers how. Also decide which pricing calls stay with Dan, such as custom fab and fleet bids above a dollar line, and write that line down.

Number it moves:

- Leading: decisions reaching Dan per day, against the Day 37 log.
- Lagging: the share of closed work quoted by someone other than Dan.

Done looks like: Three signed pages and a posted org chart with three names under Dan. When someone brings Dan a decision they own, he sends it back instead of making it.

Step 8: The Write-Up Sheet, the Job Packets and Dan's Fitment Notes

Delegable (Dan records the notes)

- **System:** FM08 Order-to-Install Process System
- **Owners:** The counter/service writer owns the write-up sheet. The floor lead owns the packets. Dan records the fitment notes.

- **Due:** Write-up sheet at the counter by Day 45. Three packets built, and one tested, by Day 60.

What to do:

Write-up sheet. The vehicle block comes before the price block: year, make, model, trim, cab and bed, what is already on the truck, and the exact question asked.

Never-guess rules, on the back of the sheet: fitment, install time, street legality, and factory warranty position get captured and called back the same day by a named person.

Special-order routine: confirm availability and price, take a deposit, log the core charge, and tell the customer what happens if the part runs late.

Job packets for the top three job types: lift and leveling, wheels and tires with alignment, and tonneau and bed covers.

Fitment notes. After any job with a known trap on a specific model, Dan records a 90-second voice memo. Claude cleans it into a line in the packet.

Scheduling rule: no job goes on the board until its parts are in the building and checked. The floor lead approves any exception.

The handbook's first rule, "Fitment first. If it rubs, it is wrong, no matter what the catalog says," is the standard the packets write down.

Number it moves:

- Leading: the share of tickets with a complete vehicle block before a price is quoted.
- Lagging: comebacks as a share of jobs delivered, counted as comebacks with a cause.

Done looks like: The newest installer runs a packet on a real install with the floor lead watching and not helping. Everything he had to ask about gets fixed in version two.

Step 9: The One-Page Plan, the Market Position and the Competitor Board

Owner Only

- **System:** FM02 One-Page Plan and Market Position
- **Owner:** Dan. The counter/service writer fills the competitor board.
- **Due:** One page posted by Day 45. Position tested on five customers by Day 60.

This is Dan's stated priority, a business plan for next year, and it starts from the 2026 strategic goals he already wrote.

What to do:

Three-year destination: a shop a buyer can run without Dan.

Rules the shop does not break: take them from the handbook.

This year's targets in numbers:

- Revenue from $3.0M to $3.6M, a $600,000 increase or 20% in relative terms
- Bay utilization from roughly 65% to 85%, a 20-point increase
- Five recurring fleet accounts
- 400+ Google reviews at 4.8 stars

These targets agree with each other. Twenty points of utilization is about 31% more bay hours sold, which covers 20% more revenue without a fifth bay.

Owners and numbers: cut the year to three or four priorities, each with a name. Give each key person one number: the counter/service writer owns close rate, the floor lead owns comebacks and bay hours sold, and parts owns parts landed on time.

Answer "customers have access to many other shops" with a competitor board. Cover the three or four shops Ridgeline loses work to, the tire chain, the online seller shipping to the driveway, and the dealer accessory counter. Price three common jobs at each and read their bad reviews for the complaint that repeats.

Test candidate edges against the four questions: specific, provable, paid for, and not copyable in 90 days. Candidates:

- Fitment-first, with a written no-rub guarantee
- A documented re-alignment recall on every lift sold
- The SEMA build reputation, backed by build photos

Number it moves:

- Leading: the share of new customers who came for the named edge, from one intake question.
- Lagging: close rate on the work the position targets.

Done looks like: The page is on the wall. Three crew members, asked separately, give the same sentence about who Ridgeline is for and why customers pick it.

Step 10: The Supplier and Overhead Review and the 13-Week Cash Forecast

Delegable (the office person builds the list). **Owner Only** on negotiation.

- **System:** FM06 Numbers, Margin and Cash (the Annual Spend and Supplier Review, and the 13-Week Cash Forecast)
- **Owners:** The office person builds the list and the forecast. Dan negotiates.
- **Due:** Spend list by Day 40. First renegotiations and the forecast live by Day 60.

What to do:

List every recurring cost over a threshold Dan sets: distributors, insurance, software, equipment leases, vehicles, utilities and shop supplies.

Make three passes:

- Renegotiate rather than auto-renew.
- Get a second quote on anything large, starting with insurance.
- Cancel what nobody uses.

Take the Step 5 short-shipment and freight log into each distributor conversation and ask for freight terms and volume tiers.

Convert the monthly Q1 2026 forecast (net cash flow of $14,200 in January, $9,800 in February, $23,600 in March) into thirteen weekly rows. Each distributor bill, payroll, and the equipment note go on the week they actually hit.

Work the cash levers: deposits on special orders, a written chase on the $38,400 in fleet receivables at 5, 15 and 30 days, and clearing slow stock from the $214,000 in inventory before the spring build.

Know where the $95,000 line of credit stands before the season, not during it.

Number it moves:

- Leading: dollars renegotiated, and the week of the lowest projected cash balance.
- Lagging: cost of goods as a share of revenue, and overhead against the $216,000 baseline.

Done looks like: A ranked spend list with a decision beside each line, two renegotiations closed, and a 13-week forecast reviewed every Monday.

6 Phase 3: Transfer (Days 61 to 90)

The goal of this phase is to put the follow-up on rails, take the meeting off Dan, decide the hire on evidence, and give the exit a baseline.

Step 11: The Review Ask, the Next Contact Date, Fleet Account Owners and the First Reactivation Pass

Delegable

- **System:** FM10 Repeat Business, Reviews and Reactivation
- **Owner:** Counter/service writer. Fleet accounts are assigned by Dan.
- **Due:** Review ask and next contact date live by Day 70. First reactivation pass counted by Day 90.

What to do:

Review ask. Send three messages after every closed job: a check-in with no link, then the review request with the same words and the same Google link to everyone, then one reminder to people who did not click. Do not sort by who seemed happy, and offer nothing in exchange.

Next contact date. No ticket closes without a next contact date set on the install's own schedule, such as a lift re-alignment at twelve months.

Reactivation pass. Send the backfilled lift buyer list from Step 6 a specific message about their own truck, a few at a time, during business hours.

Fleet accounts. Give every fleet account one named owner who is not Dan by default, with a quarterly call whether or not there is a job on the books. Run the fleet bids from Q1 2026 through a written first-90-days handoff. That is the path to five recurring accounts.

Reviews goal. The current review count is not in the documents. Record it on Day 61 so the 400+ goal has a starting line.

Decision Point: The phone, the quote follow-up, the review ask and the list are what BizRevGrowth was built for. An AI employee answers in Ridgeline's name when every hand is on a truck, takes the caller's details so the counter can follow up, texts back missed callers, and chases quotes that went quiet. It takes the message. It does not sell, and fitment questions still go to a person.

- Pro is $497 a month. Max is $997 a month and adds the marketing: reactivation of the past customer list, seasonal offers, and quote and deposit follow-up, with the first campaign set up together.
- Both come with 30 days free, no setup fee, and no long-term contract.

- Turn it on only after the quote board and the record standard are live, so it writes to something true. The other option is running this by hand. Either way, the FM07 board governs it. Details are at bizrevgrowth.com.

Number it moves:

- Leading: review requests sent against jobs closed (close to one for one), reactivation replies, and quotes from replies.
- Lagging: booked jobs and dollars from reminders and reactivation, and the twelve-month repeat rate.

Done looks like: A review request goes out on every closed job, a next contact date is on every ticket, a named owner sits beside every fleet account, and the first campaign is counted: sent, replied, quoted, booked.

Step 12: The Meeting Handoff and the Crew Skills Board

Delegable

- **System:** FM04 Weekly Scorecard and Accountability Rhythm (the meeting handoff and the Crew Skills Board)
- **Owner:** The floor lead runs the meeting. Dan and the floor lead build the skills board together.
- **Due:** Meeting run without Dan by Day 75. Skills board on the wall by Day 90.

What to do:

One week, the floor lead runs the meeting while Dan sits quiet. The following week, Dan is not there and reads the notes afterward.

Build the skills board: the shop's 12 to 20 jobs down the side, the crew across the top, each square marked alone, with help, or not yet.

Circle every job with only one name, Dan's fitment and fab work included, and put a second person in training on each with a date.

Add a rotating 15-minute teach to the meeting: whoever solved something hard shows the rest of the crew.

Number it moves:

- Leading: meetings held without Dan.
- Lagging: critical jobs with only one name on the board. That number should fall every quarter.

Done looks like: A dated decision list from a meeting Dan did not attend, and a second name in training behind at least two single-name jobs.

Step 13: The Service Writer Decision and the Role Card

Owner Only

- **System:** FM05 Hiring, Crew and Org Structure (the One-Page Role Card and the Hiring Loop, the First 90 Days and the Written Pay Range)
- **Owner:** Dan
- **Due:** Role card and hire decision by Day 90. The hire itself can follow.

What to do:

Write the role card in outcomes, not duties: quotes sent same day, close rate, open quote dollars worked, and "is my part in yet" answered from the record.

Write the pay range and a 30/60/90 plan before any offer goes out.

Use the evidence from Phases 1 and 2 (the decision log, the quote scoreboard, and the counter's close rate) to decide what the seat actually is.

When applications come in, AI can rank them against the role card. Dan reads the top five and makes the call.

Decision Point: The 2026 goal is a full-time service writer, and the shop already has a counter/service writer. Decide whether the hire is a second counter seat, or whether the current counter/service writer moves up and the new hire takes the counter and the parts calls. The counter's close rate against Dan's answers that question.

Number it moves:

- Leading: Dan's counter hours per week.
- Lagging: the share of closed work quoted by someone other than Dan.

Done looks like: A one-page role card, a written pay range, and a dated decision on the seat.

Step 14: The Exit Baseline

Owner Only

- **System:** FM12 Shop Value, Succession and Exit Readiness
- **Owner:** Dan. The office person assembles the folder.
- **Due:** Scorecard and succession map by Day 90. Buyer's folder started by Day 90.

What to do:

Score the eight value drivers, 1 to 10 each, with the reason beside every score: financial performance, growth trajectory, owner independence, documented systems, bench strength, customer concentration, market position, and recurring versus transactional revenue.

Measure concentration. Write down the largest fleet account's share of the year. Fleet in total was $300,000 of the FY2025 $3,000,000.

Draw the succession map for the counter, the floor, parts, the books, and Dan.

Start the buyer's two-day folder with add-backs written out, so earnings are documented instead of claimed. Tax treatment of add-backs is a CPA question.

Put the first 30-day test on the calendar for later in year one.

This value work runs 18 to 24 months. Starting at Day 90 leaves room inside a three-year exit.

Number it moves:

- Leading: the owner independence score.
- Lagging: the documented systems score at the next quarterly re-score.

Done looks like: A scored sheet with reasons, a succession map with backups named, a folder started, and the 30-day test dated.

7 90-Day Proof

What must be true on Day 90:

- Thirteen weeks of scorecard history, a name on every line, and bay hours sold read weekly against the 65% baseline.
- The weekly meeting has run without Dan at least once, and its decisions are written and dated.
- Thirty-plus days of attendance log exist, every second occurrence was followed by a conversation inside three days, and the standard is applied the same way to everyone.
- The rate card and discount limits are live, the price decision is made and dated, and the counter/service writer quotes lift and leveling packages without Dan.
- Every open quote sits on one board with an owner and a date, and close rate is known for the shop and for each person who quotes.
- The parts-landed check runs daily, and the six o'clock calls no longer reach Dan.
- The record standard is applied forward, paper files are retired for new work, and the ten-record check is on the scorecard.
- Dan's direct reports have dropped from seven to three on paper, with signed authority pages and a floor lead named.
- The one-page plan is on the wall, and three crew members give the same sentence about who Ridgeline is for.
- A review request goes out on every closed job, the first reactivation pass is counted, and every fleet account has a named owner.
- At least two renegotiated supplier or overhead contracts exist, and the 13-week cash forecast is read every Monday.
- The eight value drivers are scored, the succession map is drawn, and the 30-day test is on the calendar.
- On re-score, Accountability and Data & AI have both moved off CRITICAL.

8 Where This Plan Typically Breaks Down

Dan takes the quote back. This is the most common failure for an owner who is also the best tech. The counter writes a quote off the new rate card, Dan reads it, adjusts the price "just this once," and the counter learns the card is a suggestion. Within a month every quote is walking to the bay again. The repair is a discipline, not a document. Read the quote, correct the counter's reasoning out loud, and let the quote go out under the counter's name. Pricing authority that keeps getting overridden was never transferred.

The meeting dies in spring. The rhythm holds through February and gets cancelled the first week four fleet trucks have to go out. Once it skips twice, the crew reads correctly that the scorecard is optional, and accountability slides back to Dan's four o'clock bay walk. Hold the meeting in the busiest week especially. Forty-five minutes on Monday replaces the interruptions it takes to rebuild the week by Wednesday.

The hard conversation waits for a better week. "Techs not showing up" is a top challenge because it has been carried for a while. Owners at this stage write the attendance rule and then avoid applying it to the one tech the shop depends on. The A players notice first and leave first. The rule only works if it is applied to everyone, starting with the hardest name.

A fourth pattern is worth one line: hiring the service writer before the authority pages exist. A new hire with no written authority becomes one more person walking decisions back to Dan, and the shop now pays two people to route through him.

9 What Direct Engagement Adds

Two patterns stand out in this assessment.

First, the owner is the best tech and the price. Final pricing on every job, with Delegation scoring 80%, means the transfer looks finished from inside the shop when it is not. Deciding which pricing calls move first, and which stay with Dan through a sale, is a judgment call. It is also the one buyers examine closest.

Second, bays at roughly 65% with $305,000 in retail quotes open. That constraint is administrative, so the sequence matters: one named owner of the schedule and the follow-up first, then intake, then pricing that fills the open hours.

Under both is the exit. John coached the owners of Dataline Systems through succession and positioned the company for sale. It sold to CardWorks at a significantly increased valuation with 100 percent employee retention. Three years is enough time to make Ridgeline transferable without destabilizing what works, if the order is right.

Reach out directly to explore whether direct engagement makes sense alongside this plan: support@bizrevgrowth.com

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